TITLE: Streamlining Approvals and Billing for Operational Service Requests

Approval Date:	Report Out Date:

Background

The current service request (SR) process often requires DET employees to contact customers multiple times to obtain agency approvals and billing information. Since these customer interactions are unnecessary and add no value for the customer, they result in process delays and customer dissatisfaction. Also, delays in closing the SR occur due to outstanding billing tasks and consequently skew DET metrics. This project was based off the current server build process.

Goal

- Reduce the amount of time needed to obtain agency approvals and complete billing tasks.
- Improve customer/employee satisfaction

Agency Issues Identified

1. No approval given
2. Correct approval list
3. No one owns approval list
4. Training
5. Automated Scheduled completion dates
6. Paper lists
7. Approval Lists confusing
8. No formal process

Slippery Issues Identified

1. DET Staff Training Process
2. Bloated billing
3. Miscategorized service request
4. Multiple requests in service request
5. No approvals
6. Management not following process
7. Built without a Service request, submitted via email
8. Takes staff time

ESD\Tech Issues Identified

1. No billing approval
2. Incorrect approval list and not in a central location
3. Lack of information and consistency in information
4. Paper lists
5. Automated Scheduled completion dates
6. Authorizer\Requestor being out

Billing Issues Identified

1. No billing approval
2. Incorrect approval list and not in a central location
3. Lack of information and consistency in information
4. Paper lists
5. Scheduled completion dates

Average Days SR Create Date To Resolution

Server Build Requests in the Server Team Cherwell Assignment Group	46.30 Days

Average Days Task Open to Close

Server Build Tasks in Billing\Rates Cherwell Assignment Group	42.65 Days

Average Days SR Open to Close

Server Build Requests in the Server Team Cherwell Assignment Group	66.13 Days

Calculation of Waste

Current DOC Process
Process Time: 30 Min
Lead Time: 3 Days, 4 Hrs and 15 Min

Current DOT Process
Process Time: 25 Min
Lead Time: 3 Days, 2 Hrs and 10 Min

Current Slippery Process
Process Time: 25 Min
Lead Time: 5 Days, 1 Hrs and 15 Min

Current ESD Process without info
Process Time: 55 Min
Lead Time: 9 Days and 19 Min

Current ESD Process with info
Process Time: 20 Min
Lead Time: 1 Days and 19 Min

Current Billing Process
Process Time: 40 Min
Lead Time: 91 Days and 20 Min

Proposed Approval Process
Process Time: 30 Min
Lead Time: 19 Min

Proposed Billing Process
Process Time: 15 Min
Lead Time: 15 Min

Approval Recommendations

- Agencies will maintain a list of approvers and provide the Distribution List(s) to DET
- Agency approver list will be maintained in Cherwell
- Specific Forms in Cherwell
- Service, Subservice and Action will drive the required specific form
- Specific form will provide the approval and billing fields required before further routing from the ESD
- Logic for emails in Cherwell requesting billing information and approvals
- Clock doesn't start until information received
- Auto escalations if no information
- Specific form requesting billing start date
- Remove the Automated Scheduled Completion Date
- Add Billing date field
- Report to agencies showing pending tickets waiting for approvals

Billing Recommendations

- Billing begin date
- Specific Form

Project Members	Role
Susan Lee	Process Owner
Billy Jo Peterson	Lean Project Team Lead
Eric Landsverk	ESD Member
Sari Awadalla	Server Member
Srinivas Gadi	Web Platform Services Member
Christi Daveler	Business Relationship Manager
Terri Oliversen	Business Performance\Billing Member
David Hesse	DOT Member
Nathan Harper	DOC Member
John Pribek	Lean Project Subject Matter Expert

Follow Up Plan

1. Implement Cherwell workflow functionality
2. Follow up survey to customers
3. Run metrics report for timeliness

Measures to track improvement

- Amount of time elapsed between original submission of SRs and time when all the necessary agency approvals are obtained
- Amount of time elapsed between original submission of SRs and time when billing tasks are completed
- Customer/employee satisfaction survey results

TITLE: Streamlining Approvals and Billing for Operational Service Requests

Approval Date:	Report Out Date:

DOT Agency Current Process Without Approval or Billing Info

Requester
- Determines Need 5 min
- Asks BITS Requestor 5 min

1 Day

BITS Requester
- Receives Email 5 min

1 Day

Supervisor
- Asks for approval 5 Min

1 Hour

1 Day

Authorizor
- Approves
- Yes/No
- 5 Min 5 Min
- Provides Approval or denial Email 5min

2 Hour

Enterprise Service Desk
- Receives approval and continues with ESD process

DOC Agency Current Process Without Approval or Billing Info

Requester
- Open SR 5 min
- Receives Email 5 min
- Asks for approval 5 Min

3 Days   **1 Hour**

Authorizor
- Approves **1 Hour** Yes/No **1 Hour** Provides Approval or denial Email 5min

5 Min   **5 Min**   **1 Hour**

Enterprise Service Desk
- Receives SR and reviews using ESD process 5 min
- Send email requesting infor 5 Min

5 Min

- Receives approval and continues with ESD process

Slippery Process

Agency Requestor
- Opens Request 5-10 min
- Receives Equipment 5-10 min
- Receives Email 5 Min
- Starts Agency Process 5 Min

1 Day

ESD Agent
- Receive Request 1-5 min

1 Day   **1 Day**

BRM
- Sends email to Supervisor 5 Min

Billing
- Catches it missing by report 2-5 days
- Researches SR with Tech Team 1 hour
- Contacts BRM, ESD & Agency 20 Min

1 Day

DET Management
- Opens Request 5-10 min

5 Min

Tech Team
- Receive Request 1-5 min
- Begin Work
- Turns over to Requestor

1 Day

TITLE: Streamlining Approvals and Billing for Operational Service Requests

Approval Date:	Report Out Date:

Billing Current Process Without Completed Information

Configuration (CI) Manager
- Create CI — 5 Min

Billing Analyst
- 1 Day
- Receive Task — 5 Min → Review Task — 5 Min → Missing Information? → 1-3 Day → Email Contact Areas — 5 Min → Go to slippery process — 5 Min

Billing Current Process With Completed Information

Configuration (CI) Manager
- Create CI — 5 Min

Billing Analyst
- 1 Day
- Receive Task — 5 Min → Review Task — 5 Min → Complete? → 5 Min → Active CI? Yes\No → 90 Days / No → Review as time permits — 5 Min → 5 Min → Send updated info to Billing Entry — 5 Min
- Yes → 5 Min

Billing Entry
- Enter Info into Billing System — 5 Min → 5 Min → Enter Info Data Storage State — 5 Min → 5 Min → Close Task — 5 Min

ESD Current Process

Agency Authorizer
- Reviews Request → NO → 1 Day → YES → Sends approval email and funding code → Requests ticket closed → 1 Day

Agency Requestor
- Opens Request 5-10 min → 1 Day → Receives email → Sends approval to SR Manager → 1 Day

ESD Agent
- 10 Min → Receive Request 1-5 min → 1 Min → Create Billing Task 5min → 1 Min → Review Request for Approval 5-10 min → 5 Min → NO / YES → Send email to agency → 1 Day

Service Request Manager
- Route to SR Manager → Wait 1 day send email to requestor 5 min → 1 Day → Wait 1 day send reminder email to requestor 5 min → Receive email & update ticket 5 min → Update Billing task with info 5min → 1 Day → Receives approval and routes to Work schedule 15 min

Billing
- Billing Task Review → 1 Min

Work Schedule
- Route to Work schedule with approval → 1 Day
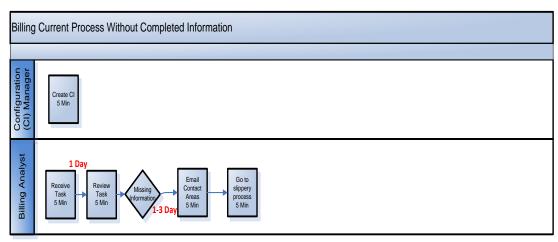
Tech Team
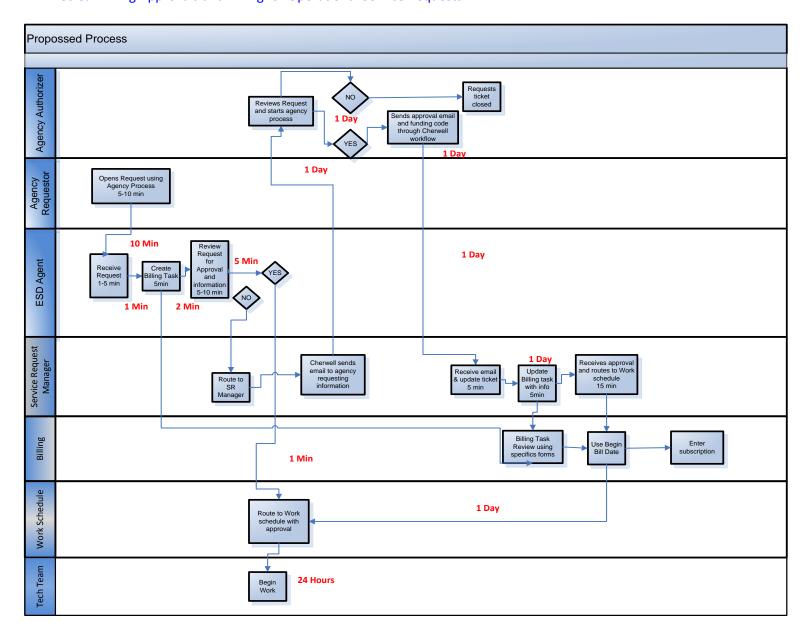- Begin Work → 24 Hours

3

TITLE: Streamlining Approvals and Billing for Operational Service Requests

Approval Date:	Report Out Date:

Proposed Process

Agency Authorizer

- Reviews Request and starts agency process
- NO
- **1 Day**
- YES
- Sends approval email and funding code through Cherwell workflow
- **1 Day**
- Requests ticket closed

1 Day

Agency Requestor

- Opens Request using Agency Process 5-10 min

ESD Agent

- **10 Min**
- Receive Request 1-5 min
- Create Billing Task 5min
- **1 Min**
- Review Request for Approval and information 5-10 min
- **2 Min**
- **5 Min**
- YES
- NO
- **1 Day**

Service Request Manager

- Route to SR Manager
- Cherwell sends email to agency requesting information
- Receive email & update ticket 5 min
- **1 Day**
- Update Billing task with info 5min
- Receives approval and routes to Work schedule 15 min

Billing

- **1 Min**
- Billing Task Review using specifics forms
- Use Begin Bill Date
- Enter subscription

Work Schedule

- Route to Work schedule with approval
- **1 Day**

Tech Team

- Begin Work
- **24 Hours**

4